

Microsoft Teams - Saving Records



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What type of Records are you looking to capture in Microsoft Teams?

The following step by step guides will walk you through saving records to EZ Desktop and EZ Email from Microsoft Teams.

- I need to save...
 - [Private Chat transcripts as a record](#)
 - [Teams Chat transcripts as a record](#)
 - [Shared Files in a Private Chat or Meeting Chat as a record](#)
 - [Shared files in Teams and Teams Chat as a record](#)
 - [Voicemail messages from a Teams Call and it's corresponding transcribed message as a record](#)
 - [Meeting Recording in Teams as a record](#)
 - [A Planner board as a record](#)
 - [Wiki Pages or Meeting Notes created in Teams as a record](#)
 - [Calendar entries in Teams as a record](#)
 - [Contacts within Teams as a record \[Follow Outlook Procedures\]](#)

MS Teams - Private Chat



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Currently, there is no way to export a transcript of your chat conversation in Microsoft Teams directly to ECMS. Transcripts of your private chat conversations are saved to a hidden folder in your personal Outlook account and are captured under Capstone. Please contact the ECMS help desk <mailto:ecms@epa.gov> if you have a need to save a transcript of your private chat conversations that have a retention greater than 10 years.

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MS Teams - Teams Chat



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Currently, there is no way to export a transcript of your chat conversation in Microsoft Teams directly to ECMS. Transcripts of your Teams chat conversations are saved in a group mailbox within Outlook and are **NOT** captured under Capstone. Please contact the ECMS help desk <mailto:ecms@epa.gov> if you have a need to save a transcript of your Teams chat conversations.

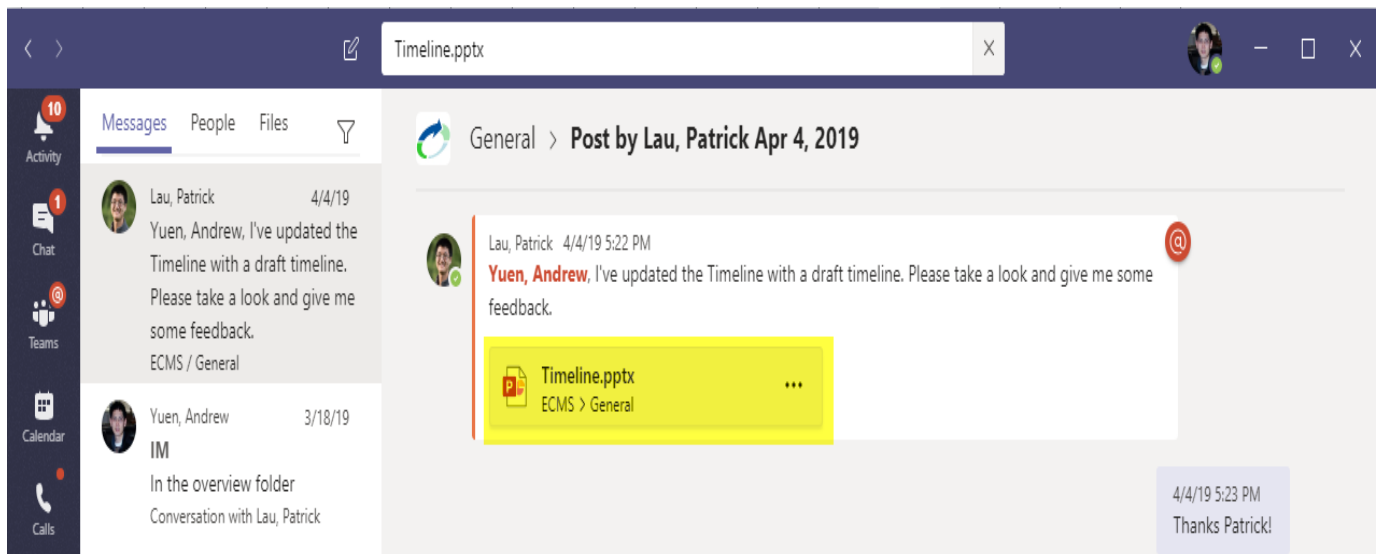
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MS Teams - Shared Files in a Private Chat or Meeting Chat



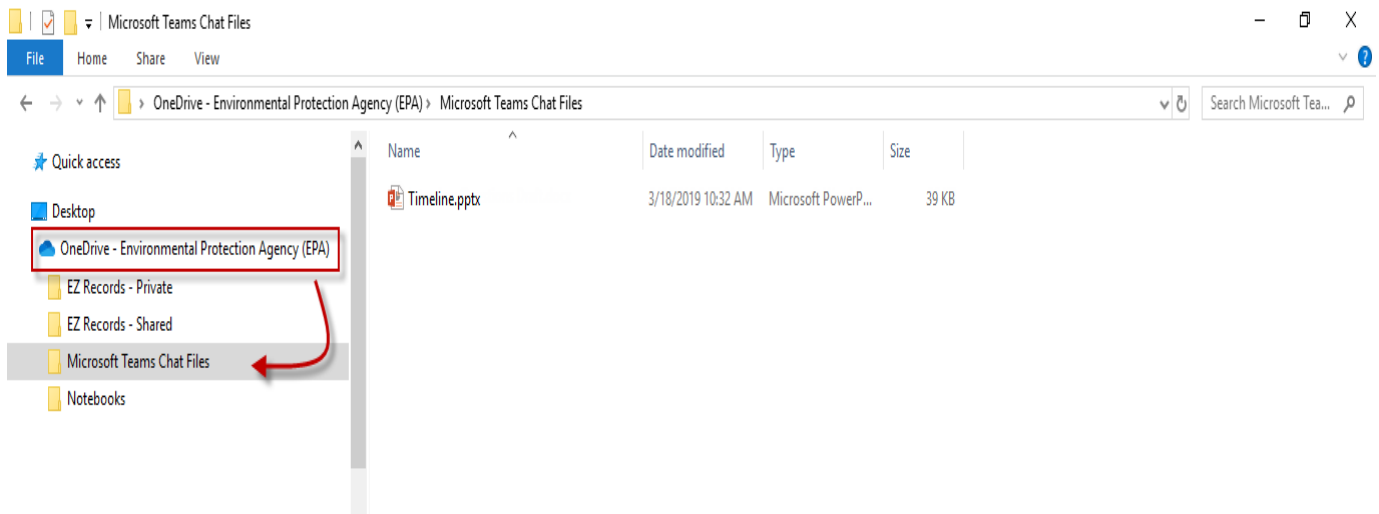
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Here is an example of a shared file located within a private chat/meeting chat.

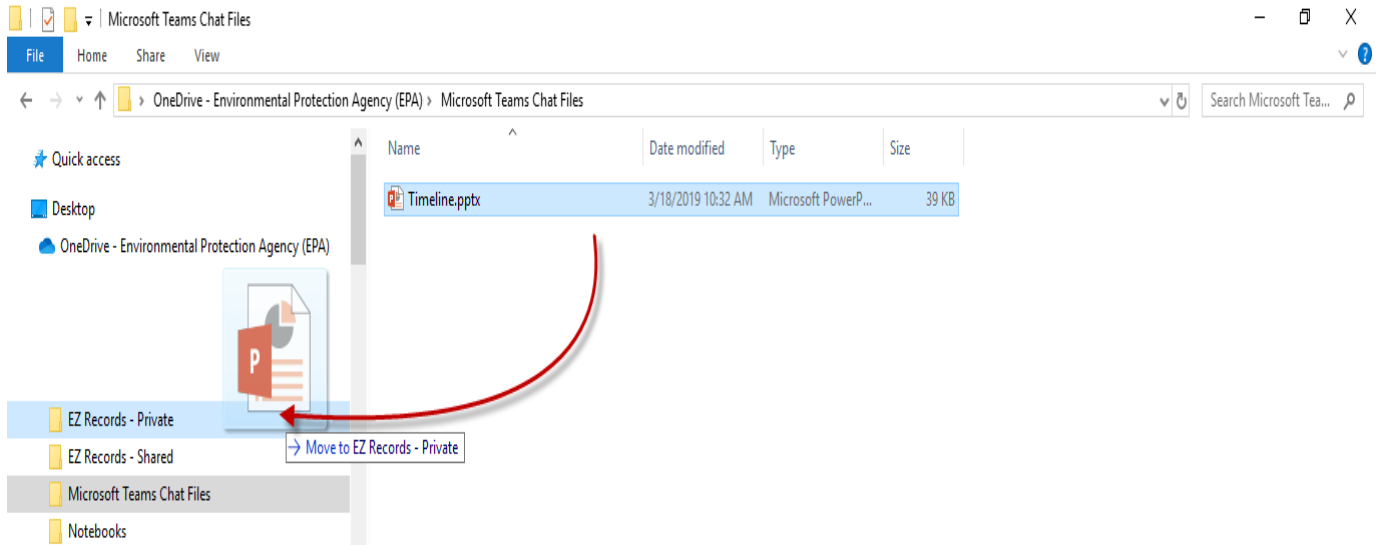


In order to save this shared file as a record, follow these steps:

STEP 1 - Navigate to your OneDrive and find the folder titled: **Microsoft Teams Chat Files**



Step 2 - Drag and drop the record into the EZ Records - Private or EZ Records - Shared Folder in your OneDrive.



Complete! You have successfully saved a shared file in your chat as a record.

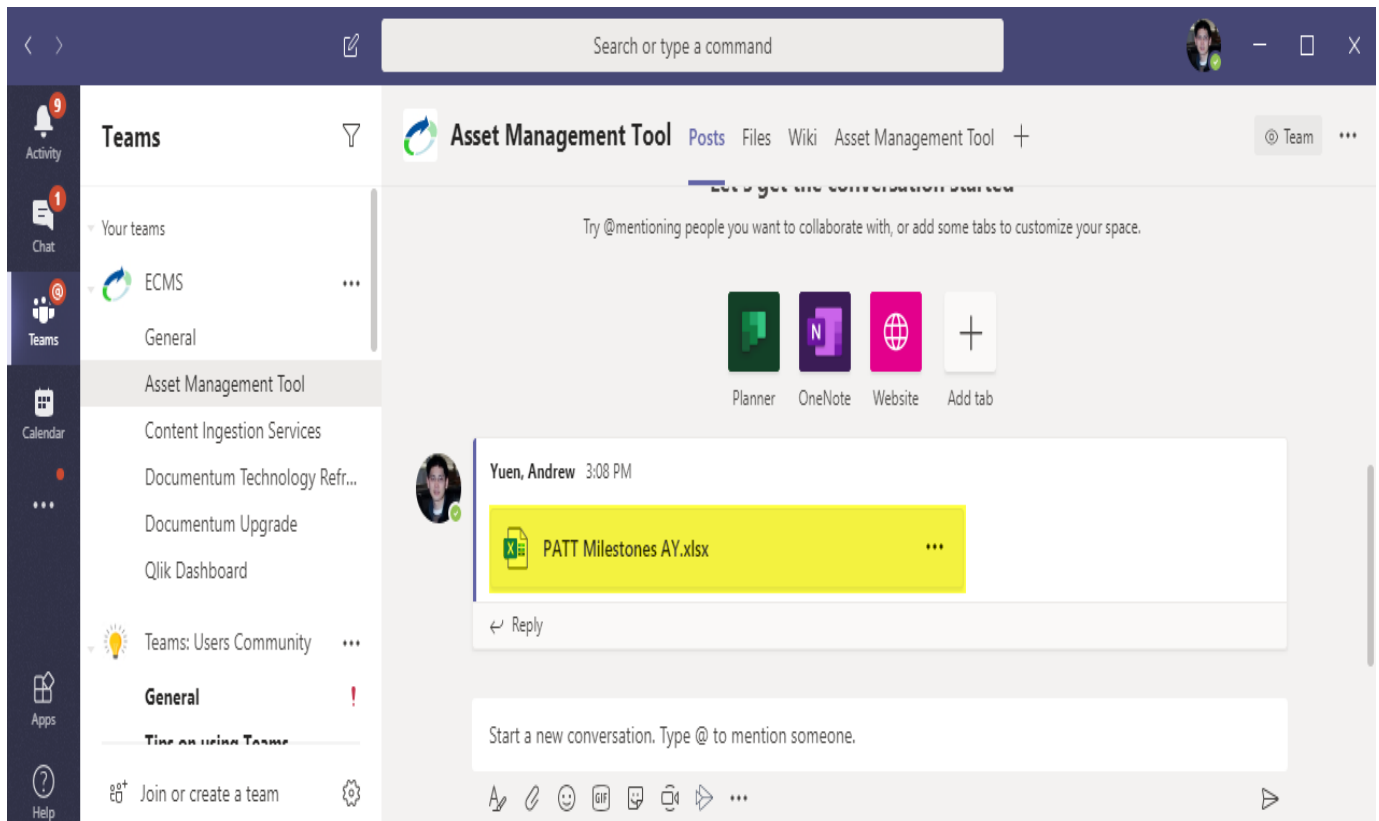
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MS Teams - Shared File in Teams Chat



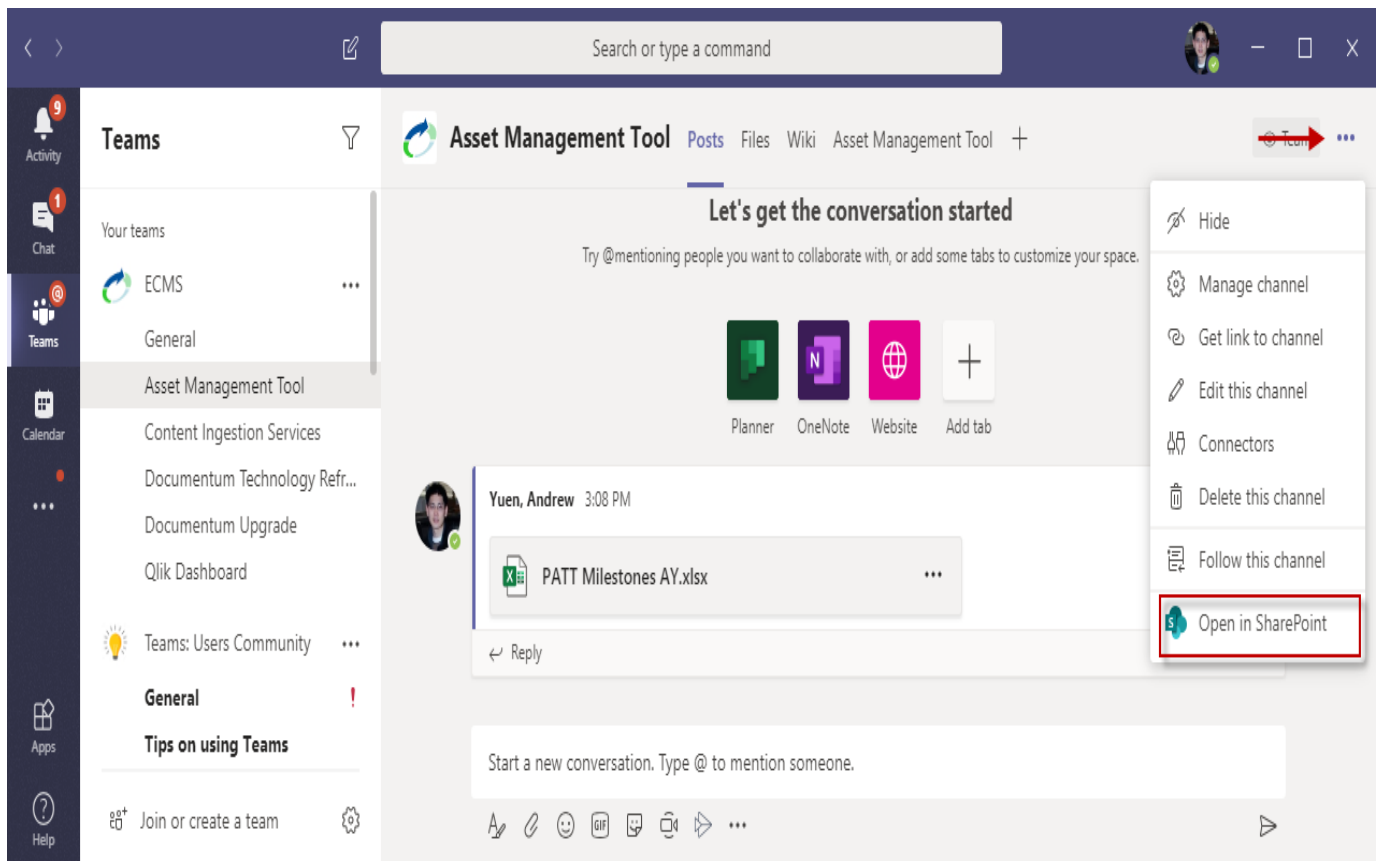
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Here is an example of a shared file located within a teams chat.

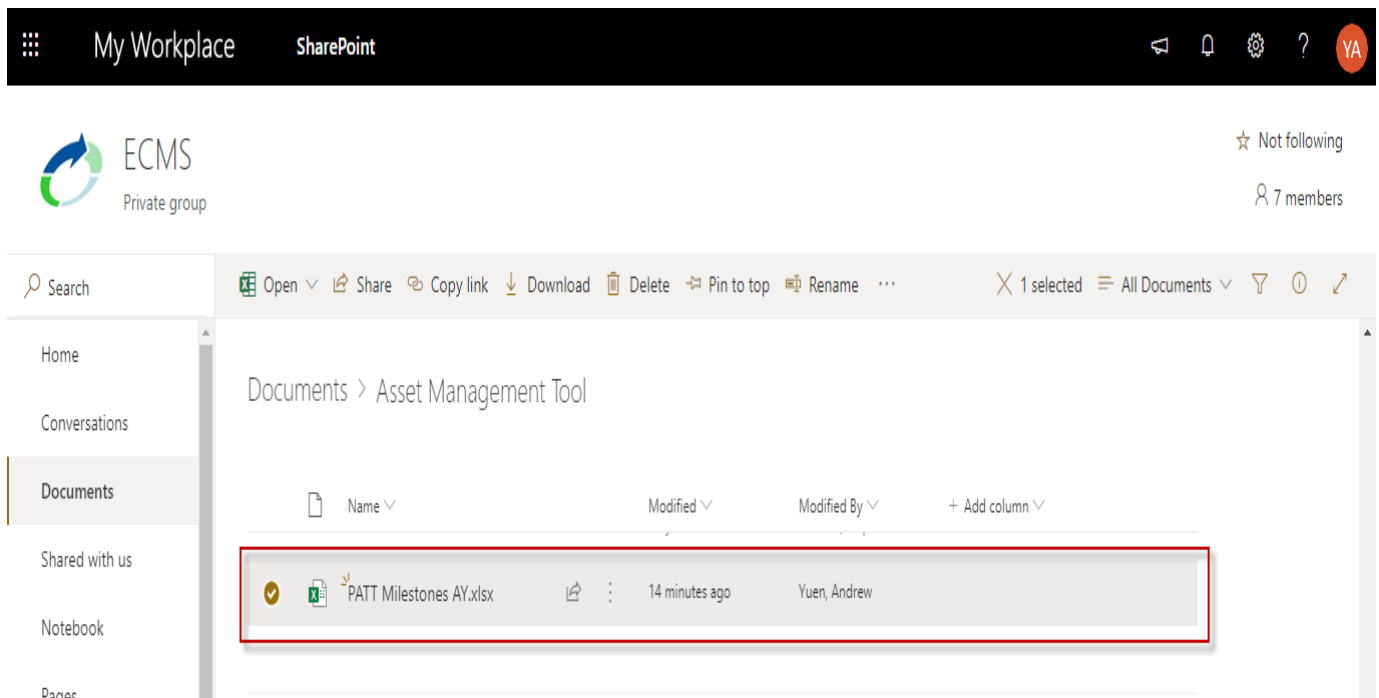


In order to save this shared file as a record, follow these steps:

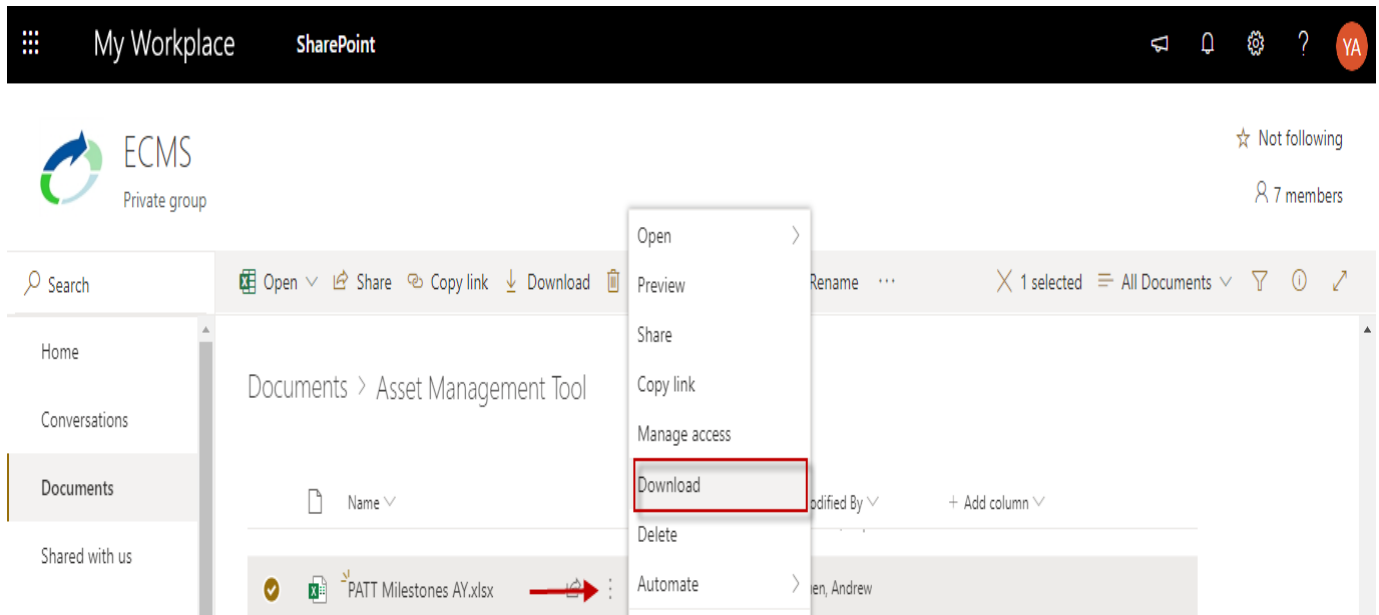
STEP 1 - Navigate to Open in Sharepoint by clicking the ellipses located on the top right.



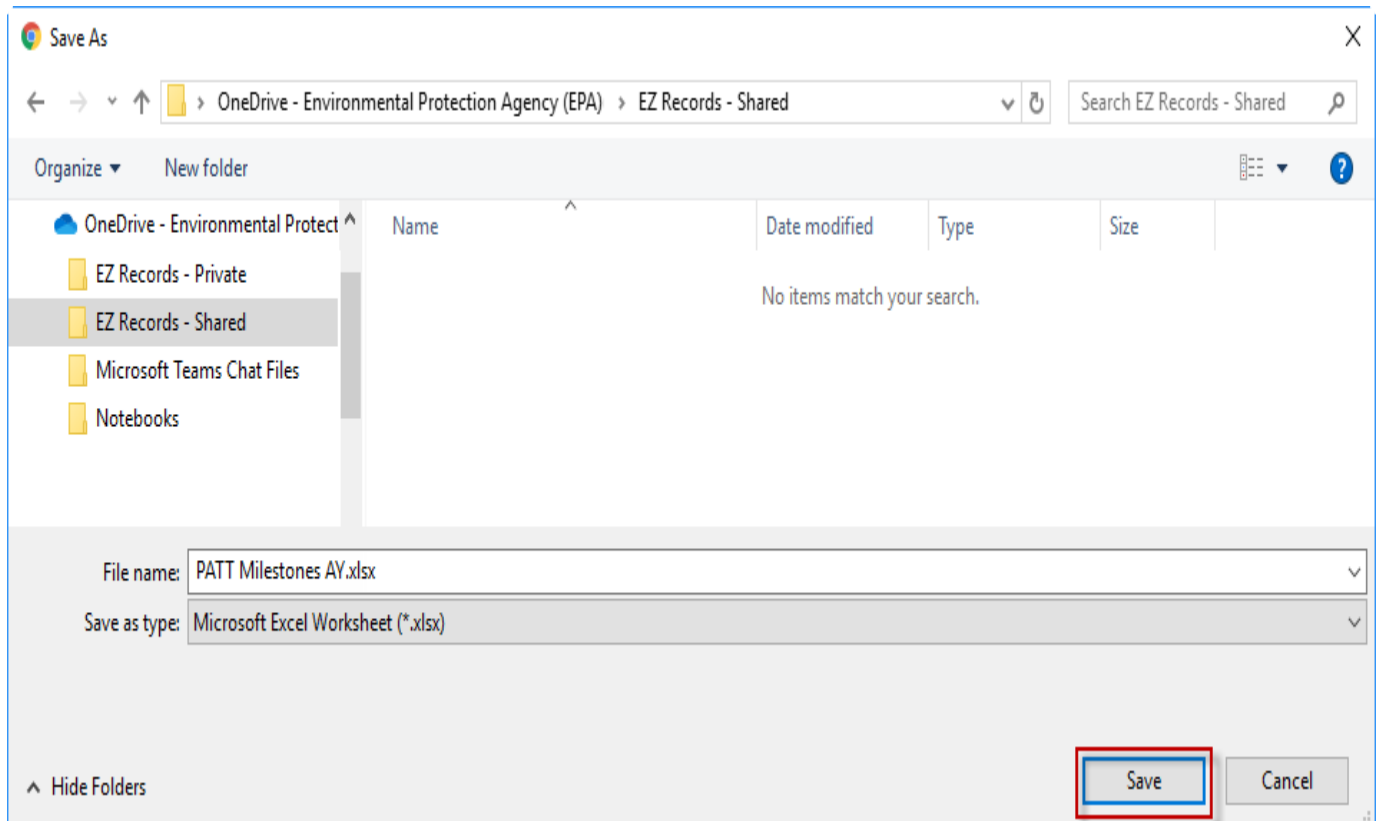
STEP 2 - Once in SharePoint, locate the file.



STEP 3 - Click the ellipses and select download.



STEP 4 - Save the file directly to EZ Records - Shared or EZ Records - Private in your OneDrive.



Complete! You have successfully saved a shared file in your chat as a record.

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MS Teams - Voicemail messages from a Teams Call



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MS Teams transcribes and saves voicemails as mp3 files that are sent directly to your Outlook Inbox.

In order to save a voicemail and it's corresponding transcript as a record, follow these steps:

STEP 1 - Navigate to Outlook and locate the email containing the voicemail and corresponding transcript.

The screenshot shows the Microsoft Outlook interface. The top ribbon includes tabs for File, Home, Send / Receive, Folder, View, and Developer. The Home tab is active, showing various action buttons like New, Reply, Forward, and More. The left sidebar shows the Favorites list with 'Inbox 6622' selected. The main pane displays a list of emails, with one email from 'Schouw, Stephanie' (Voice Mail (4 seconds)) highlighted. The right pane shows the details of this email, including the sender's name, email address, and a transcript of the voicemail. The transcript text is as follows:

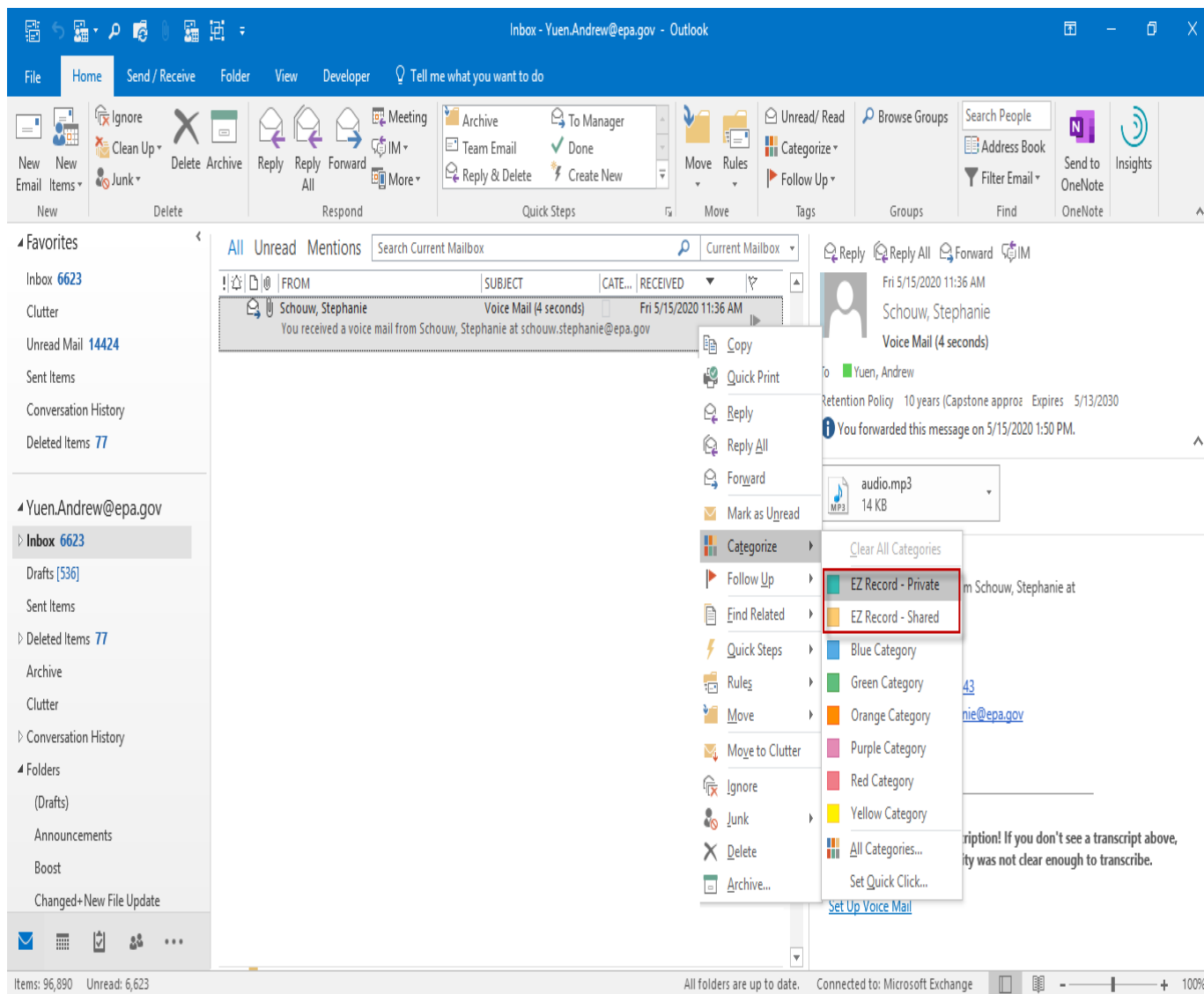
You received a voice mail from Schouw, Stephanie at schouw.stephanie@epa.gov.

Company: OMS
Work: [+1 202-566-2743](tel:+12025662743)
Email: schouw.stephanie@epa.gov

Thank you for using Transcription! If you don't see a transcript above, it's because the audio quality was not clear enough to transcribe.

[Set Up Voice Mail](#)

STEP 2 - Categorize the email as either EZ Record - Private or EZ Record - Shared (optional access to FAQ) [Hints for deciding whether to use the Shared or Private options in EZ Desktop Records](#)



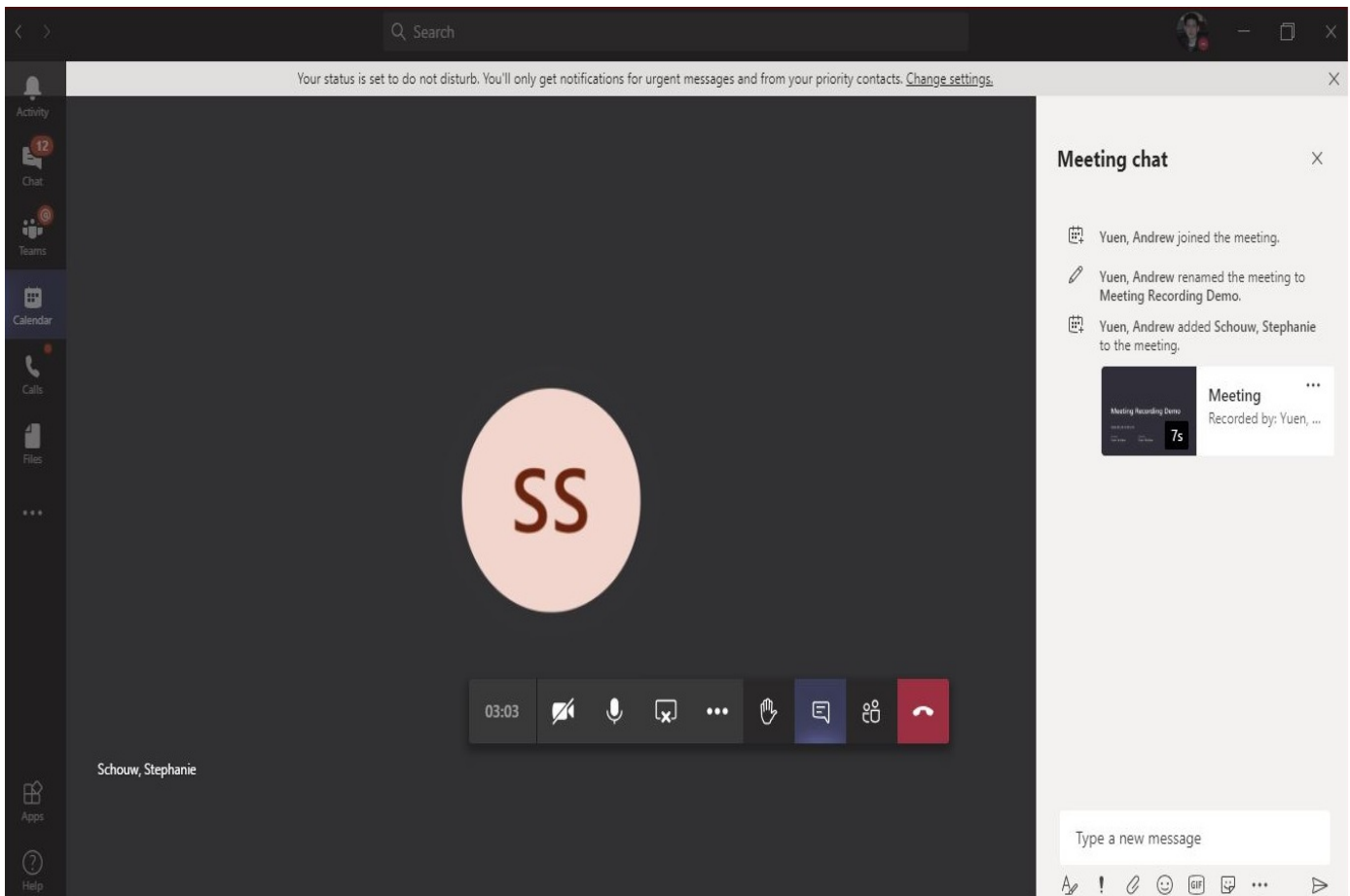
Complete! You have successfully saved a voicemail as a record.

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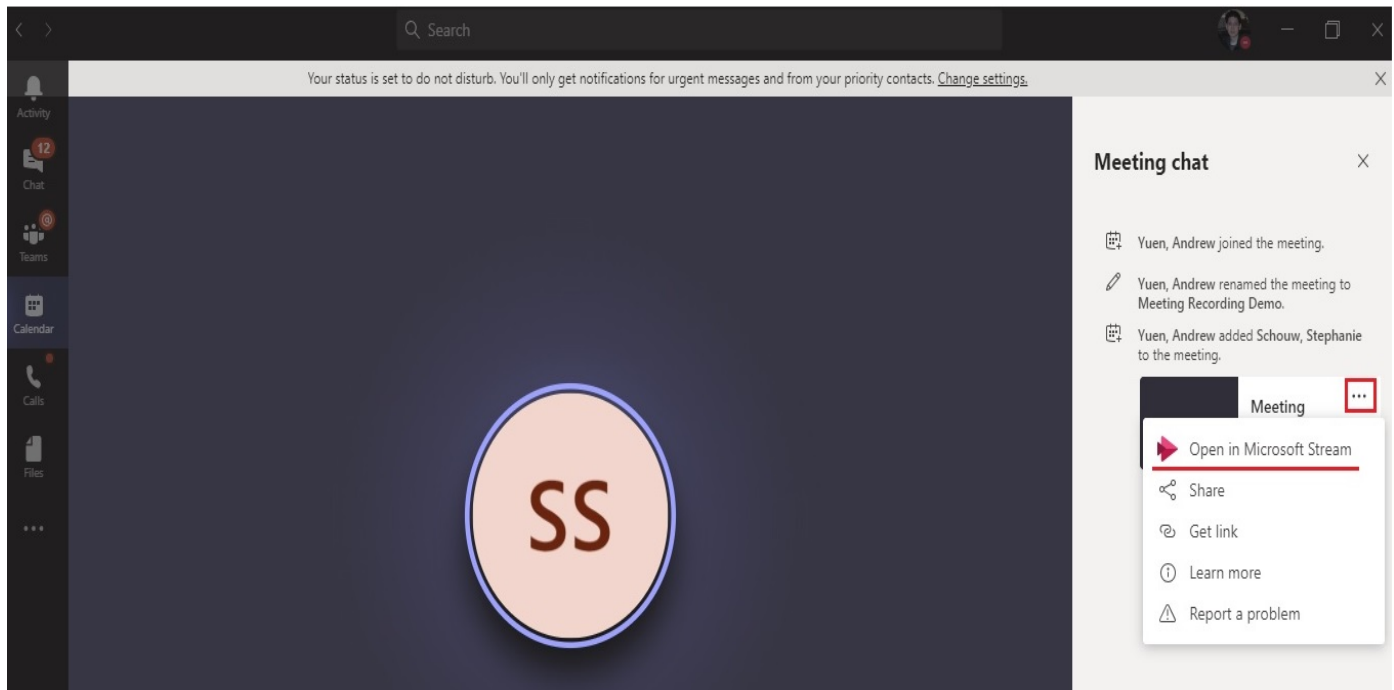
MS Teams - Meeting Recording in MS Streams

STEP 1 - Access your meeting recording in the meeting chat area.

NOTE: A meeting recording is temporarily saved in MS Streams and is retrievable for up to 30 days.

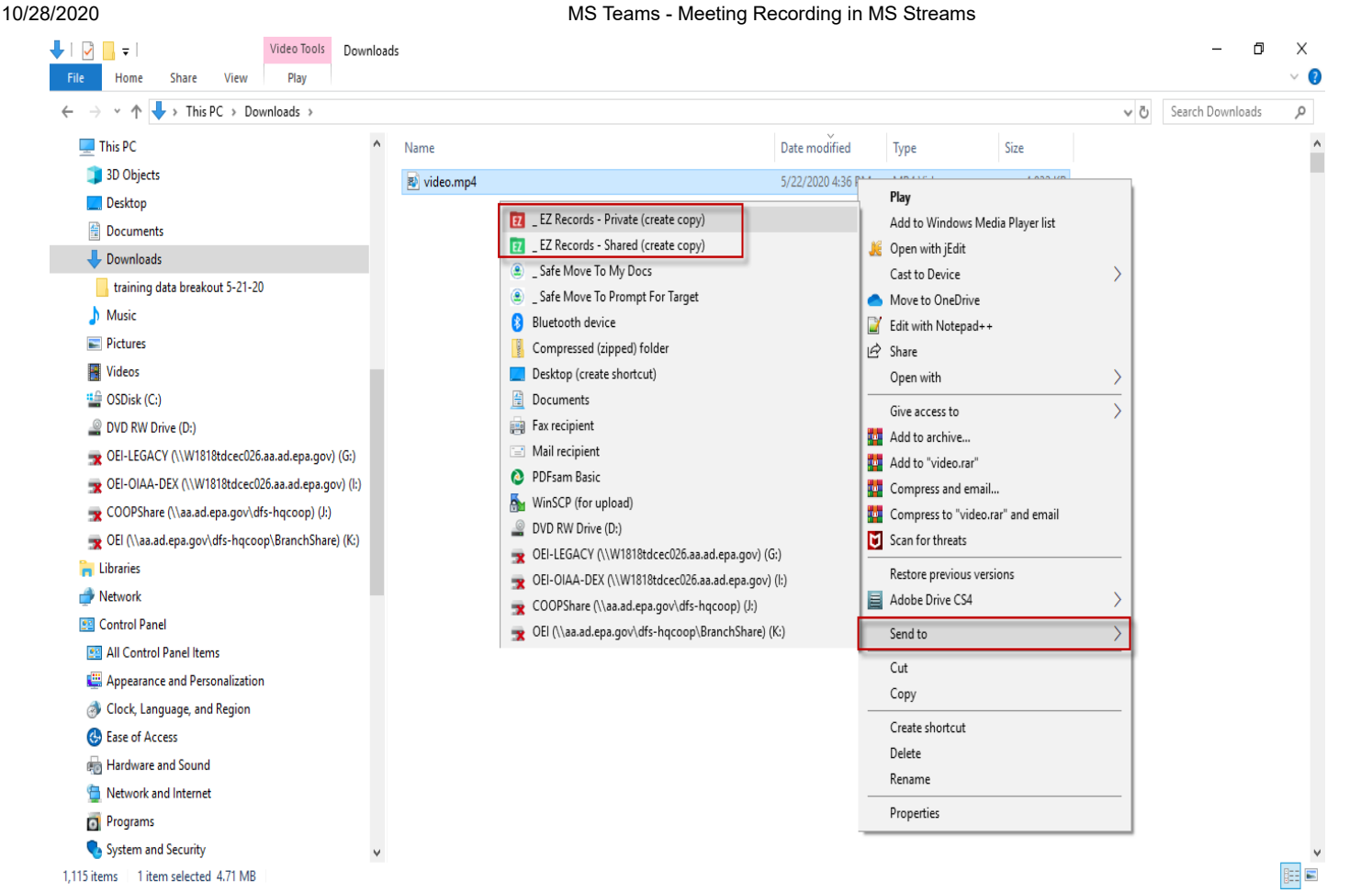


STEP 2 - Click on the ellipses and select Open in Microsoft Stream



STEP 3 - Click on the ellipses under the video and select Download Video. Save the video to your downloads folder.

STEP 4 - Navigate to your downloads folder on your local machine and locate the recording. Right click the recording and select send to EZ Records - Private or EZ Records - Shared.



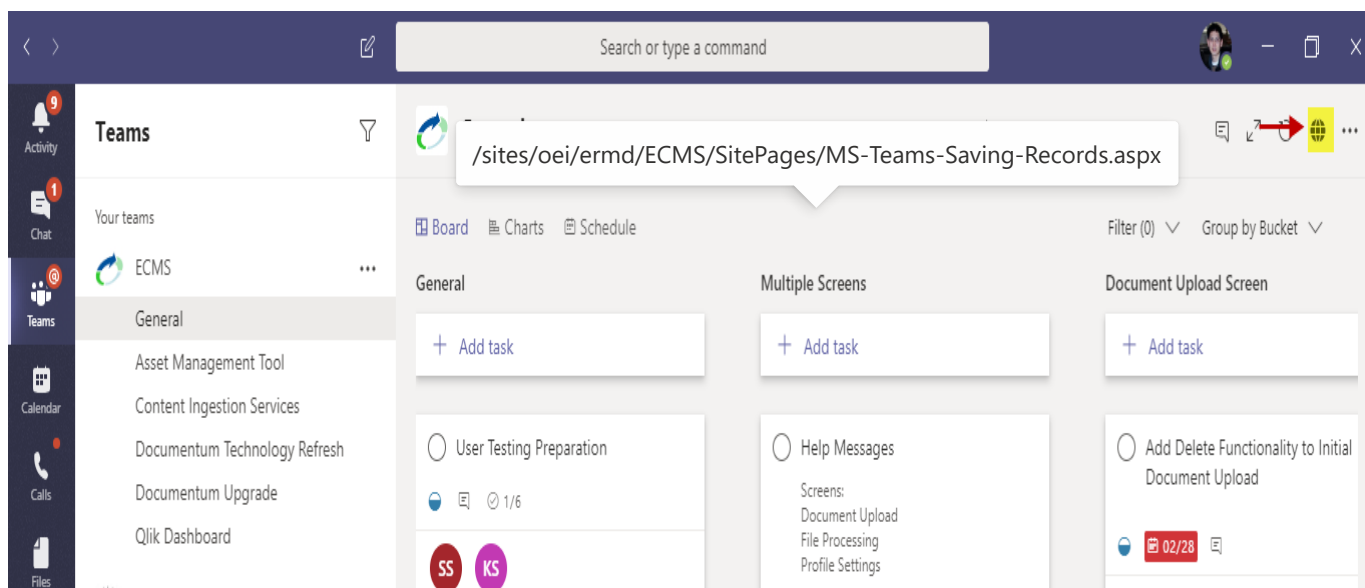
MS Teams - Planner Board



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In order to save a Planner Board as a record, the content of the board must be exported to Excel.

STEP 1 - Navigate to your Planner Board in Teams and click on the globe icon located on the upper right corner. This will open up your planner board within a browser.



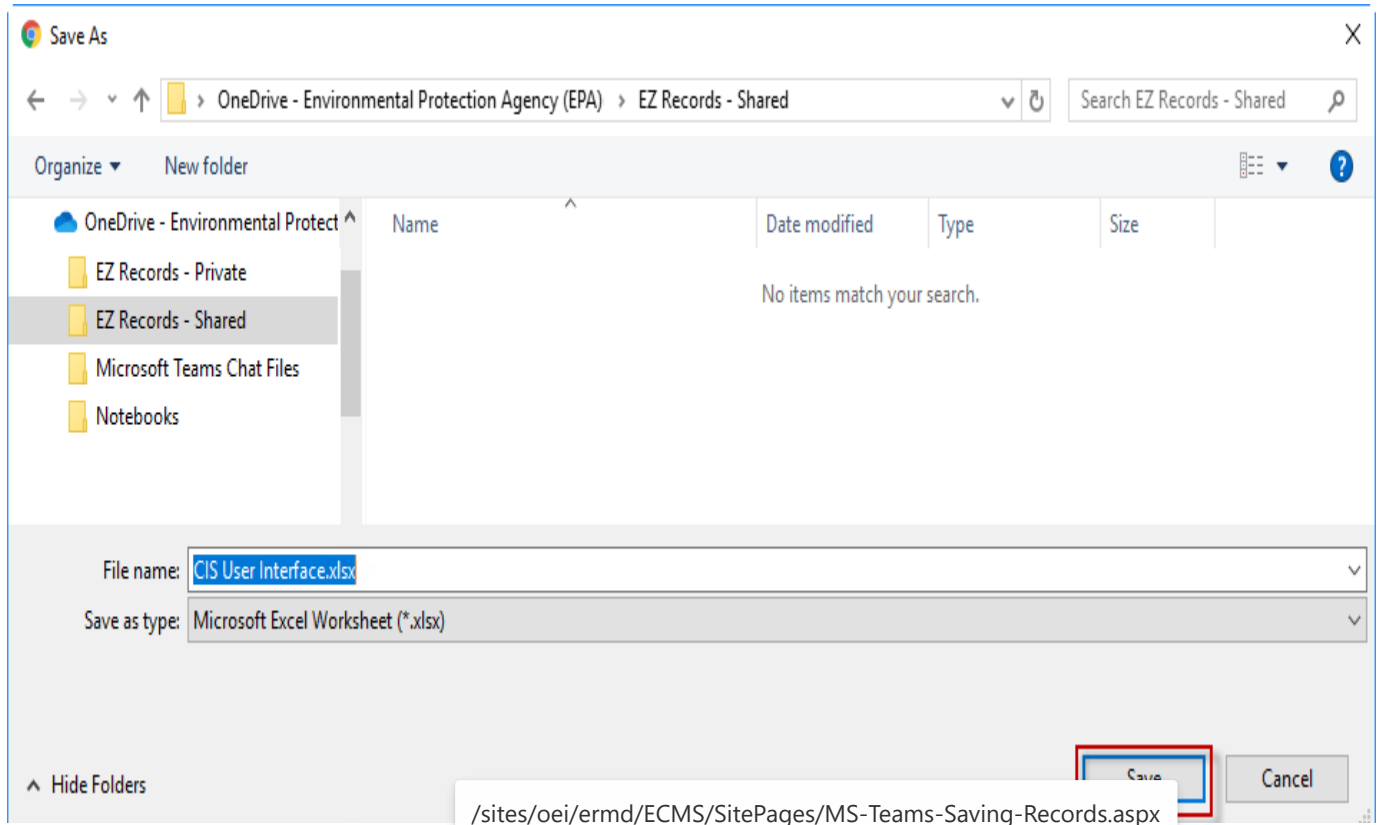
STEP 2 - In the browser version of your Planner board, click the ellipsis and select **Export plan to Excel**.

The screenshot displays the MS Teams Planner Board interface. The browser address bar shows the URL: tasks.office.com/usepa.onmicrosoft.com/en-US/Home/Planner/#/plantaskboard?groupId=3d50ca01-180d-4180-bc5b-0b9f1bdf48aa&planId=_NxmPpXjuEeiXhaPUhTKIIA.... The interface includes a left sidebar with navigation options like 'New plan', 'Planner hub', and 'My tasks'. The main area shows a Planner board for 'CIS User Interface' with columns for 'General', 'Document Upload Screen', and 'File Processing'. A context menu is open over the 'General' column, with the 'Export plan to Excel' option highlighted. A tooltip below the menu displays the URL: </sites/oei/ermd/ECMS/SitePages/MS-Teams-Saving-Records.aspx>. The board contains several tasks, including 'User Testing Preparation', 'Capture data in a database for adding into training dataset', and 'Create Installer Package'.

Sample of raw export of Planner Board

Plan name							
A	B	C	D	E	F	G	H
1	Plan name	Content Ingestion Services					
2	Plan ID	opmb55bKAECIGhUKMcW-YIAFC2r					
3	Date of export	06/17/2020					
4							
5	Task ID	Task Name	Bucket Name	Progress	Priority	Assigned To	Created By
6	EOUAN0qUnk-Is1GuaPRj1IIAFbyk	Final review of CIS controls spi	Security & Application	Not started	Medium	Yuen, Andrew;Khan, Shahjahan	Khan, Shahjahan
7	faN-Zylqw0CvjaoCf5Fy3oIACKYc	Shah Khan	Update scripts and file	Not started	Medium	Khan, Shahjahan	Khan, Shahjahan
8	wtaCaNG-cEKdbXM3eNH0AYIACCVJ	update	Update scripts and file	Not started	Medium		Khan, Shahjahan
9	bd0LOU0y00aSDyOqY7uUGIIACEah	Evaluate alternative API Mana	To do	In progress	Medium	Schouw, Stephanie;Khan, Shah	Yuen, Andrew
10	NncjpJ_bEG4j4HGpugtDYIAEReK	Begin Coordination with NCC t	To do	In progress	Important	Yuen, Andrew	Yuen, Andrew
11	24m7onPDxUukQySrXKJ_YIAH-mZ	Continue process of download	Building Training Data	Not started	Medium	Schouw, Stephanie;Nguyen, M	Yuen, Andrew
12	YNPP0QdC60yyp7EMsALKy4IAGdq4	Export data from Documentum	Building Training Data	In progress	Important	Nguyen, Minh	Yuen, Andrew
13	Ru35cx2eQEGeNw9AKG25oIACKKH	Build out Script to convert dat	Building Training Data	In progress	Important	Schouw, Stephanie;Nguyen, M	Yuen, Andrew
14	Y3tEakkNbUGxE8Ltg_6zoolAF4S	Develop strategy and SOPs for	Building Training Data	Not started	Medium	Yuen, Andrew	Yuen, Andrew
15	99CHP_M1JkrEvD20BjYUYIAEHOP	Prepare additional Testdata - t	Testing	In progress	Important		Khan, Shahjahan
16	qDhEY8erEmL7Fn7IVBsYIABNHd	Get Large Files from Documen	To do	Not started	Medium	Schouw, Stephanie;Yuen, Andr	Nguyen, Minh
17	vb6SHnuMCUGe_4NU8elloIAHB1y	Load Test DeepDetect Platfor	Testing	Not started	Medium	Schouw, Stephanie;Khan, Shah	Yuen, Andrew
18	ZZKqzdgmmUW2DFuMtCSXzoIAADoD	Privacy Approval	Security & Application	Not started	Medium	Khan, Shahjahan	Khan, Shahjahan
19	RI4UHnyOfEqmzPY90X9SUoIABR3u	Content Ingestion Endp	/sites/oei/ermd/ECMS/SitePages/MS-Teams-Saving-Records.aspx				idrew
20	dvB4lhh-v0if76WZ9XWL-olADDHi	Complete Phase 2 Docu					idrew
21	43URvsH_zEG-f2XRSWwVGYIAFC_C	Complete Application Specific	Security & Application	In progress	Urgent	Khan, Shahjahan	Yuen, Andrew
22	rn-egBpTUU-fs3LdehxQ4YIAAg4X	Adding Quality Checks to CIS	To do	In progress	Medium	Schouw, Stephanie	Yuen, Andrew
23	zpKG3ceSWkuuBkdRvuv6polAGuor	Training Data Preperation	To do	In progress	Medium	Schouw, Stephanie;Nguyen, M	Yuen, Andrew
24	jXLbkYJPBUOveZ4XbMOQ0oIAHnVG	Develop overall Test Plan	Testing	Not started	Important	Schouw, Stephanie;Khan, Shah	Yuen, Andrew
25	OsZDUjaRmUCBUMX_a0KPholAD0Y-	Create OpenAPI Specifications	Security & Application	In progress	Important	Schouw, Stephanie;Yuen, Andr	Yuen, Andrew
26	az8MVPagfkukAjlPdJV4z4IAH9uJ	Update PIA per ISSO	Security & Application	Completed	Medium	Khan, Shahjahan	Khan, Shahjahan
27	quAabMMNUcky_TGxgnjdopYIADM7j	Update PIA for CIS and PATT a	Security & Application	Completed	Medium		Khan, Shahjahan

STEP 3 - Save the export directly to EZ Records - Private or EZ Records shared in your OneDrive.



Alternatively ...

Drag-and-drop the record to the appropriate EZ Desktop Records icon (Shared or Private) on your Desktop.



Complete! You have successfully saved a Planner board as a record.

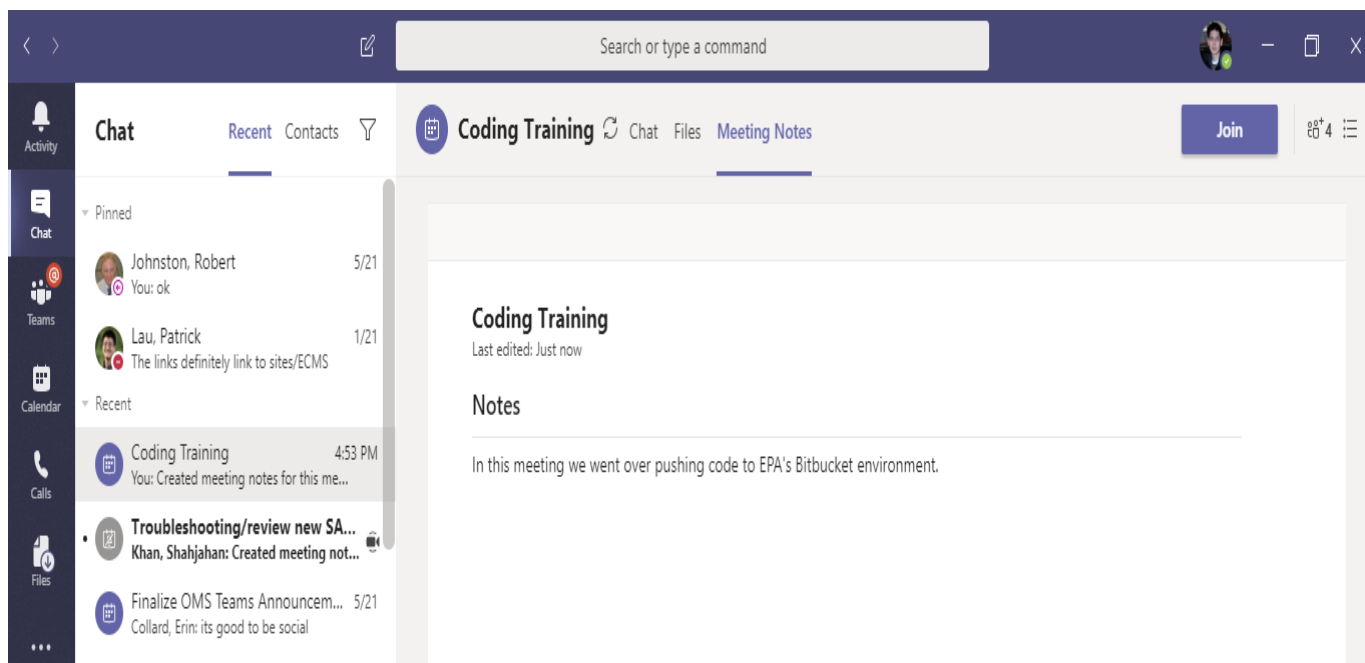
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</sites/oei/ermd/ECMS/SitePages/MS-Teams-Saving-Records.aspx>

MS Teams - Meeting Notes and Wiki Pages

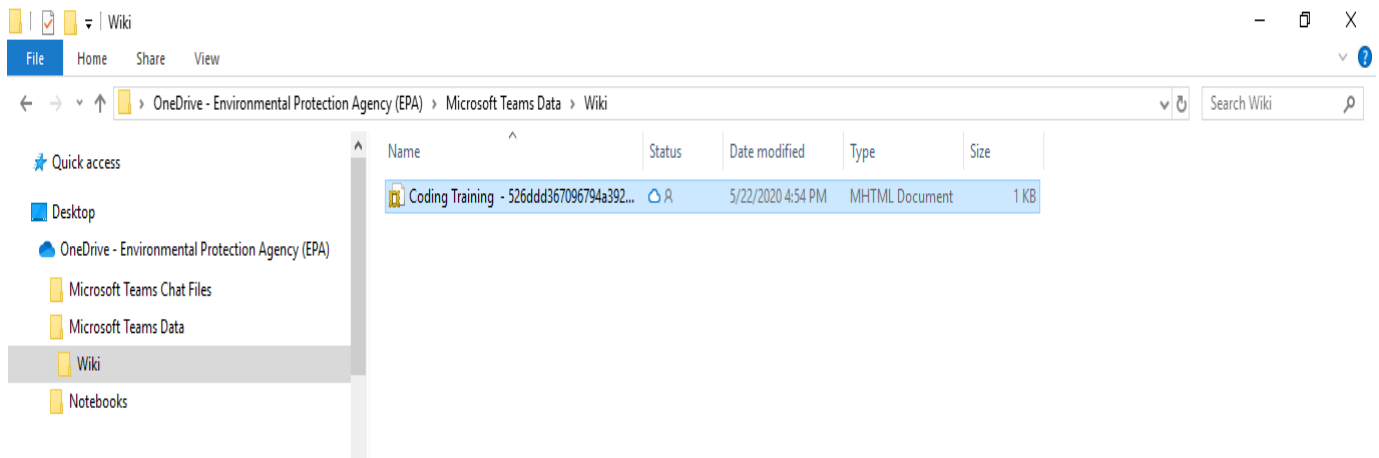
E ECMS

Here is an example of a meeting note in Teams. Wiki pages are identical to this example.

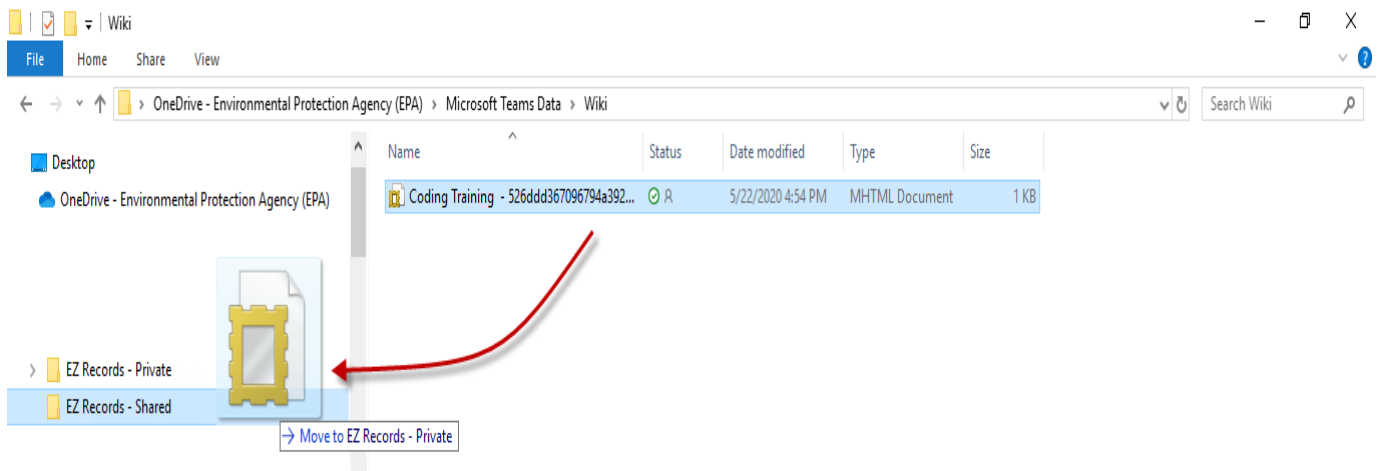


In order to save a meeting note or wiki page as a record, follow these steps:

STEP 1 - Navigate to your OneDrive and find the folder titled: **Microsoft Teams Data**
Under the Microsoft Teams Data folder, navigate to the **Wiki** folder.



Step 2 - Drag and drop the record into the EZ Records - Private or EZ Records - Shared Folder in your OneDrive (or drag and drop on the EZ Records icons on the desktop as shown below).



Alternatively...

Drag-and-drop the record to the appropriate EZ Desktop Records icon (Shared or Private) on your Desktop.



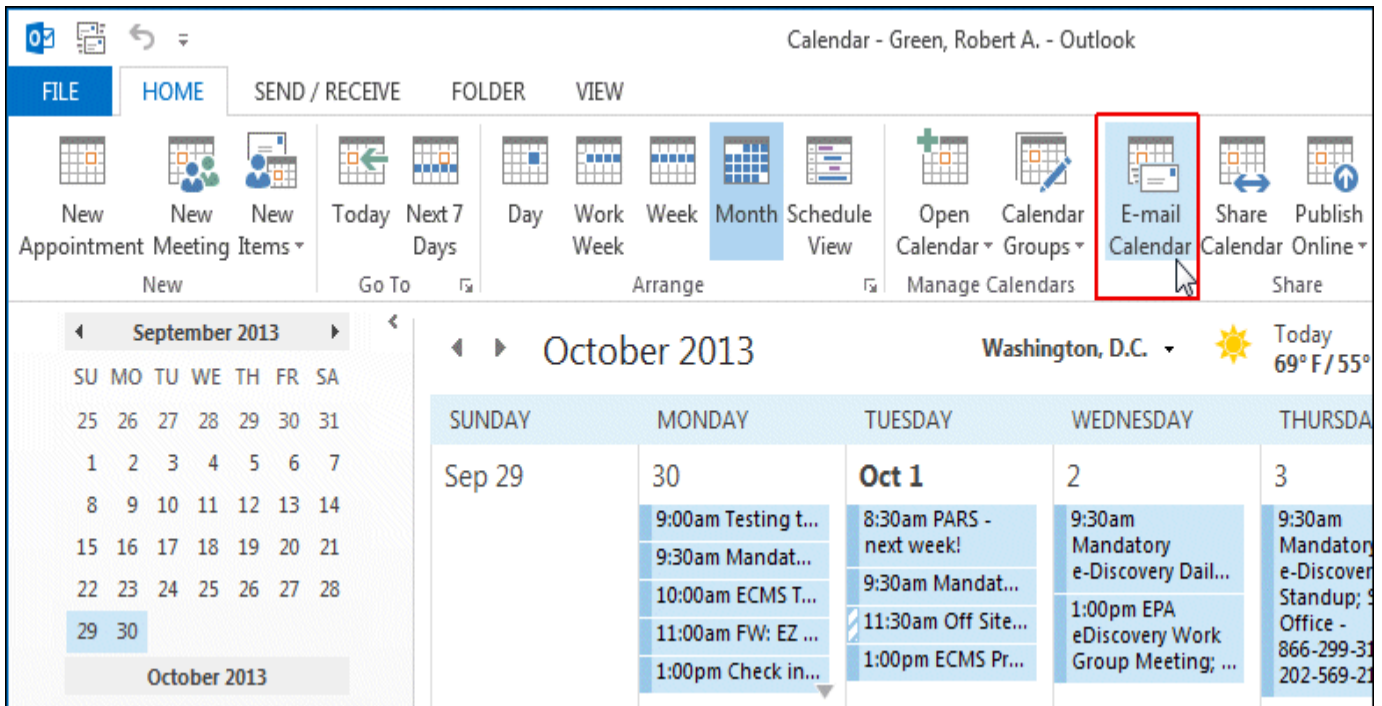
Complete! You have successfully saved meeting notes as a record.

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Calendar Records – Outlook

Senior officials' calendars are permanent records and must be saved in a recordkeeping system. Outlook calendar records can be saved by importing them into an email, which then can be saved using EZ Email Records.

STEP 1. From the "Calendar" area of Outlook, select "E-mail Calendar" from the "Home" tab.

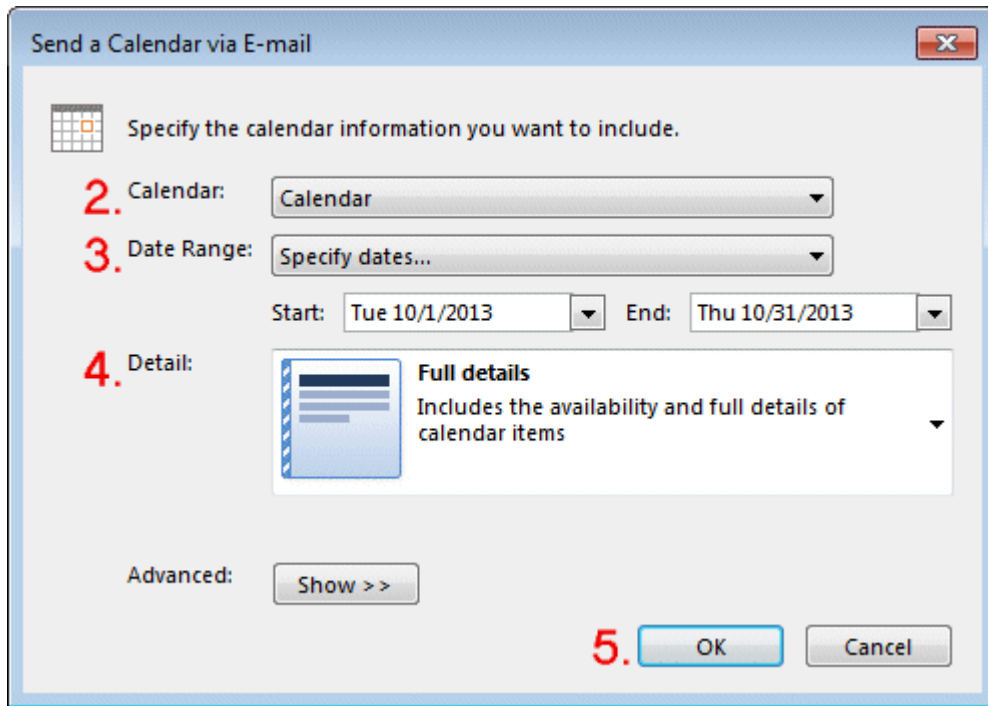


STEP 2. On the "Send a Calendar via E-mail" pop-up, select the calendar you wish to save from the "Calendar" drop-down menu.

STEP 3. Select "Specify dates..." from the "Date Range" field. Use the calendar widgets to select your desired date range (e.g., From: 10/1/2013, To: 10/31/2013).

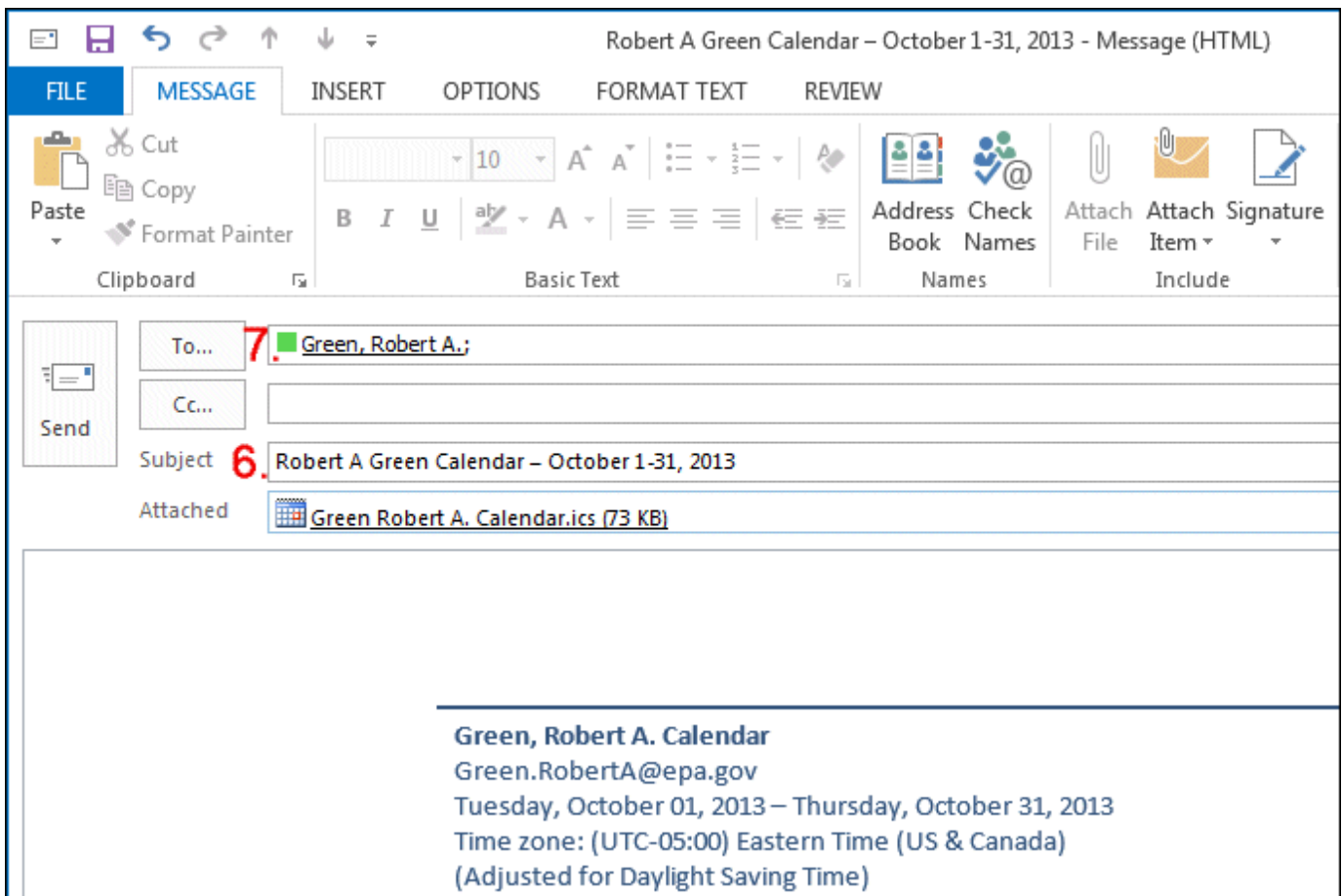
STEP 4. Select the "Full details" option from the "Detail" drop-down menu.

STEP 5. Click the "OK" button.



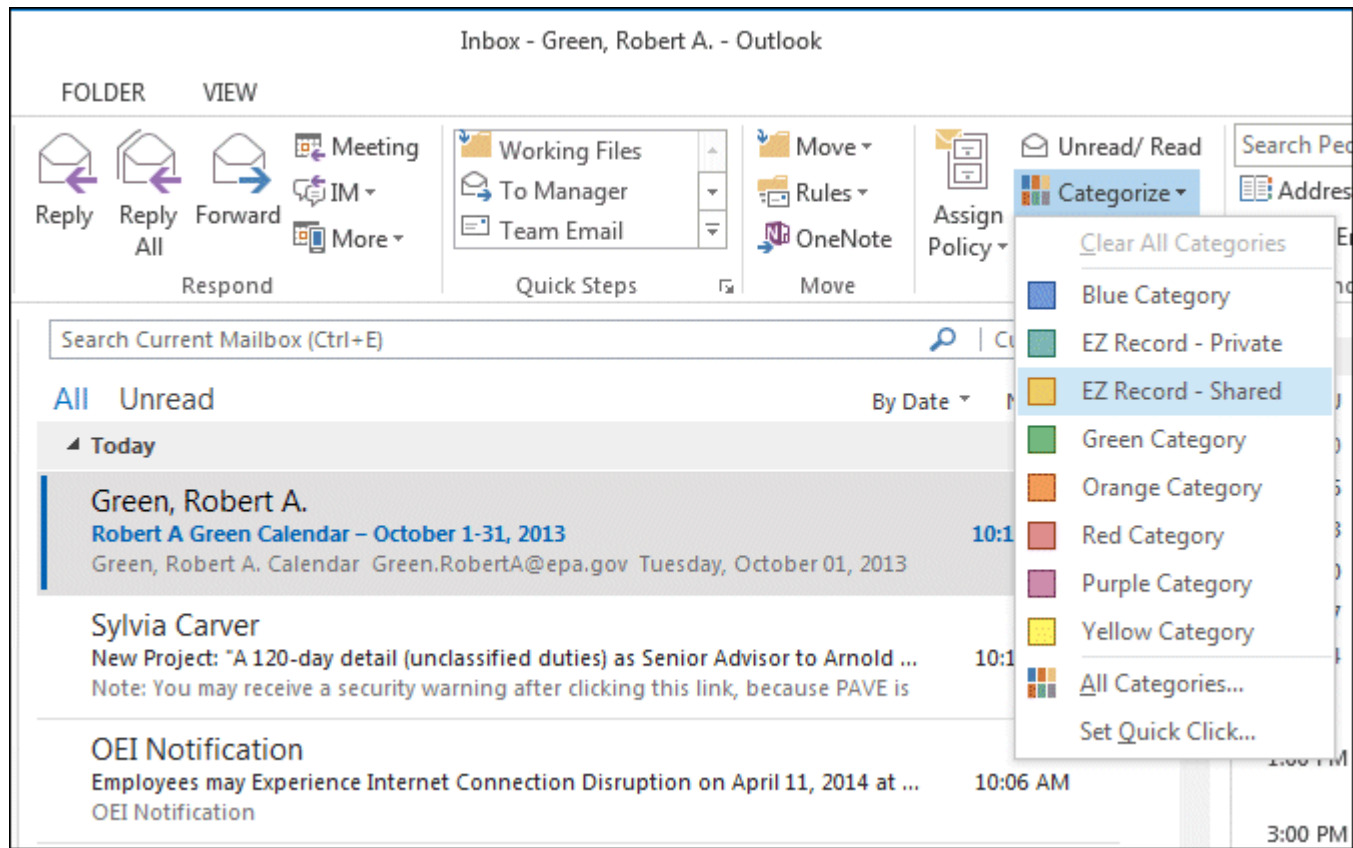
STEP 6. In the “Subject” field of the new email, enter the calendar name and date range (e.g., “Robert A Green Calendar – October 1-31, 2013”).

STEP 7. Enter your EPA email address in the “To” field and click the “Send” button.



STEP 8. Save this message as an EZ Email Record from your “Inbox” folder.

For more information on EZ Email Records, visit: <https://usepa.sharepoint.com/sites/oei/ermd/ECMS/SitePages/EZ-Email-Records.aspx>



Back to Microsoft Teams - Saving Records

Contacts within Teams as a Record – Outlook

Contacts can be saved into ECMS as a record. Simply '**Forward Contact**' as a *Business Card* to yourself. Then find the corresponding email in your inbox and save it using EZ Records.

</sites/oei/ermd/ECMS/SitePages/MS-Teams-Saving-Records.aspx>

ECMS - Contacts - ECMS - Outlook

File Home Send / Receive Folder View Help Tell me what you want to do

New Contact New Contact Group New Items Delete Meeting More

People Business C... Card

Move Mail OneNote Merge

Forward Contact Share Open Shared Contacts

Categorize Follow Up Private

Search People Address Book Find

As a Business Card As an Outlook Contact

Contact 1

Search ECMS - Contacts All Outlook Items

123 a b c d e f g h i j k l m n o p q r s t u v w x y z

Items: 1 Reminders: 26

Contact 1 - Message (HTML)

File Message Insert Options Format Text Review Help Tell me what you want to do

Paste Calibri (Box) 11 A A B I U Address Check Book Names Attach File Attach Item Signature Dictate Insights View Templates My Templates

From ECMS@epa.gov

To ECMS

Cc

Bcc

Subject Contact 1

Contact 1.vcf 994 bytes

Contact 1

Thank you.

U.S. EPA Enterprise Content Management System

<http://intranet.epa.gov/ecms/ecms@epa.gov>

/sites/oei/ermd/ECMS/SitePages/MS-Teams-Saving-Records.aspx

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